

**A. Operational Office Demographics and Contact Information**

1. Operational Office Name \_\_\_\_\_

2. Location in ROB-3 \_\_\_\_\_

3. Hours of Operation

M	_____
Tu	_____
W	_____
Th	_____
F	_____
Sa	_____
Su	_____

4. Contact Channels

Phone(s)	_____
	_____
	_____
	_____
	_____
Email	_____
Web	_____
Fax	_____

5. Contact Person \_\_\_\_\_

A. Operational Office Demographics

B. Purpose/Mission

C. Call Types and Details

D. Information Collection and Distribution

E. Future Plans

**Completed By****Email address**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

## **B. Purpose / Mission**

### **1. Description of the Operational Office**

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### **2. List the top ten business functions of the Operational Office**

1	
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### **3. List the top ten best practices of the Operational Office**

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### **4. What are the Key Performance Indicators used to measure the Operational Office?**

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### C. Call Types and Details

1. Into which categories do your customers fall? Please give percentages.

CATEGORY	PERCENTAGE
Students	
Parents	
Schools	
Financial Partners	
Other (please specify):	
_____	
_____	
_____	

2. List the top ten types of calls received from customers and what percentage these are received.

REASON	PERCENTAGE
1 _____	
2 _____	
3 _____	
4 _____	
5 _____	
6 _____	
7 _____	
8 _____	
9 _____	
10 _____	

3. Please explain the process an employee must go through to service each of the different types of calls listed above.

4. How do you interact with customers? Please give a percentage.

INTERACTION MEDIA	PERCENTAGE
In person	
Mail	
FAX	
WEB	
eMail	
Phone	

## D. Information Collection and Distribution

### 1. Where do you pull your information to answer customer's questions?

PEPS  
NSLDS  
CPS  
TIV WAN  
CMIS  
FISAP  
AWAIP WEB  
Reimbursement DB  
RFMS  
PGRFMS  
GAPS  
DRCC Cario DB  
Case School Files  
DL School Files  
DL Regional Tracking  
CAM Assignment DB  
PYCO  
DL Origination  
LOS Reports  
Institutional Assessment Model  
Debarment List  
DL Service System  
Master School DB  
Holding File DB  
Cash Control Account Spread Sheet  
Default Management Data  
IFAP  
IFAP LotusNotes  
Connect ED


### 2. Where do you push information?

PEPS  
NSLDS  
CPS  
TIV WAN  
CMIS  
FISAP  
AWAIP WEB  
Reimbursement DB  
RFMS  
PGRFMS  
GAPS  
DRCC Cario DB  
Case School Files  
DL School Files  
DL Regional Tracking  
CAM Assignment DB


PYCO  
DL Origination  
LOS Reports  
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Debarment List  
DL Service System  
Master School DB  
Holding File DB  
Cash Control Account Spread Sheet  
Default Management Data  
IFAP  
IFAP LotusNotes  
Connect ED


## **E. Future Plans**

**1.** List the top ten future goals and objectives you have for this operational office

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